

## FUNDING REPORT NOTES

February 2003

### 1. GENERAL

- a. Program Descriptions may be found at <http://www.hud.gov/funds/index.cfm>
- b. Report Period. Reports reflect data for competitive grants announced during the calendar year. Any exceptions are noted below.
- c. Funding Distribution For Purposes of This Report is site specific when information is known at award. Where not site specific, distribution of funding is most often made on a per capita basis, reflecting the service area of the award that in some cases is statewide. Exceptions are noted.
- d. Metro and Non-Metro Designation is based on U.S. Census identification of metropolitan areas; balance of counties are non-metro.
  - o 1999. Benton County changed from non-metro to metro area.
- e. Programs Not Included.
  - o Nation-wide awards made to national or regional entities. For example, SHOP Self-Help Homeownership Opportunity Program awards to Habitat to Humanity or Northwest Regional Facilitators of Spokane are not included in this report.
  - o HUD Native American Programs.

### 2. POPULATION

Oregon population data are based on the most current Portland State University, Center for Population Research and Census, Final Population Estimates for Oregon, Its Counties, and Incorporated Cities. <http://www.upa.pdx.edu/CPRC/pbsrv1.html>

Washington population data is based on the most current State of Washington, Office of Financial Management, Forecasting Division, April 1 Population of Cities, Towns, and Counties, Used for the Allocation of Designated State Revenues. <http://www.ofm.wa.gov/forecasting/sitemap.htm>

- o 2000 Oregon and Washington based on April 1, 2000 census data.

### 3. SINGLE FAMILY MORTGAGE INSURANCE

Single Family Mortgage data are the mortgage amounts and number of new endorsements made each Federal Fiscal Year, excluding HECM (Home Equity Conversion Mortgage).

### 4. MULTIFAMILY HOUSING MORTGAGE INSURANCE

MFH data are for new endorsements made each Federal Fiscal Year. Risk Sharing mortgages are valued at 50% of the actual mortgage amount to reflect the value of the risk to HUD; the number of risk share units are counted at 100%. All other MFH endorsements are valued at 100% of mortgage and units.

### 5. COMMUNITY DEVELOPMENT BLOCK GRANT

CDBG funding is stated for each entitlement area. The Oregon CDBG state grant is distributed on a per capita basis to each county without an entitlement area. For Washington, there is no distribution made of CDBG state grant for Klickitat or Skamania counties.

- o 2002 adjustment to 2001: Funding corrected to actuals. Balance of State was \$15,798,000 corrected to \$15,837,000; state total was \$39,416,000 corrected to \$39,958,000.

## **6. HOME**

HOME entitlement area funding is as reported by CPD. For Oregon, the HOME grant is distributed on a per capita basis to each county without a HOME entitlement area. For Washington, there is no distribution made of the HOME state grant for Klickitat or Skamania counties.

- o 2002 Adjustment to 2001 figures. Funding corrected to actuals. Balance of State was \$10,574,000 corrected to \$10,331,000; state total was \$20,768,757 corrected to \$20,365,000.

## **7. CONTINUUM OF CARE HOMELESS ASSISTANCE**

This category totals Supportive Housing and Shelter Plus Care initiatives for both new grants and renewals. An application may be site specific or reflect a general service area. Where a general service area is designated, funds were distributed on a per capita basis to counties within the service area. For undesignated State funds, distribution was made to counties not otherwise covered by a continuum of care planning area.

## **8. EMERGENCY SHELTER**

ESG entitlement area funding is as reported by CPD. For Oregon, the ESG is distributed on a per capita basis to each county without an ESG entitlement area. For Washington, there is no distribution made of the any State grant for Klickitat or Skamania counties.

- o 2002 Adjustment to 2001 figures. Funding corrected to actuals. Balance of State was \$857,000 corrected to \$852,000; state total was \$1,360,000 corrected to \$1,354,000.

## **9. HOUSING OPPORTUNITY FOR PERSONS WITH AIDS**

HOPWA entitlement funding is credited entirely to the Portland/Multnomah County, although the grantee jurisdiction is the Portland metropolitan area. The 2001 HOPWA included a grant to the State of Oregon. It is distributed on a per capita basis to the non-entitlement area.

- o 2002 Adjustment to 2001 figures. Funding corrected to actuals. Portland was \$950,000 and is adjusted to \$880,000.

## **10. RURAL HOUSING AND ECONOMIC DEVELOPMENT**

Most RHED grants are not site specific. Eligibility areas are limited to: a) a place having fewer than 2,500 residents, b) a county with no urban population of 20,000 or more, c) any place with a population not in excess of 20,000 and not located in a Metropolitan Statistical Area, d) U.S. Census identified rural portion of "extended cities", or e) USDA identified "open country". For purposes of distribution, RHED grants that are not site specific at application approval are distributed to U.S. Census non-metropolitan areas.

## **11. TECHNICAL ASSISTANCE - COMMUNITY DEVELOPMENT**

This category totals various TA grants awarded within the jurisdiction of the Oregon CPD unit, including: Community Housing Development Organizations (CHDO), HOME, McKinney Act, and CDBG. The grant amounts are distributed within the entire state of Oregon on a per capita basis; no distribution is made to the three counties in Washington.

- o 2001 TA awards are announced in April 2002 and are reflected in the 2002 funding. The 2002 awards are yet to be announced.

## **12. OTHER COMMUNITY INITIATIVES**

With the 2002 report several community development program funding streams have been summarized as a single line item. These include:

### **a. ECONOMIC DEVELOPMENT INITIATIVES**

These are special purpose grants designated by Congress and are typically site specific; where not funding is distributed on a per capita basis within the service area.

**b. LEAD HAZARD CONTROL**

LHC funding is credited entirely to the Portland/Multnomah County, although the grantee jurisdiction is somewhat broader.

**c. YOUTHBUILD**

Site specific.

**13. PUBLIC HOUSING**

This category totals Operating Subsidy and Capital Grant (aka Modernization) Funds. In those instances where a PHA has a multi-county jurisdiction the funds are distributed based on the ratio of units located in a county to the total number of units in the PHA jurisdiction. The number of units in the jurisdiction is based on a periodic local Public Housing report of the number of units counted for purposes of PFS (Performance Funding System). PFS unit count includes units available for occupancy and excludes those units removed from the rent rolls for a variety of reasons (i.e. used by social service agencies, sold to tenants, demolished).

- o 2002 Adjustment to 2001. Post report budget revisions resulted in changes to 2001 funding for: Polk County \$433,094 to \$437,866 and Lane County from \$1,535,371 to \$1,539,819.

**14. SECTION 8 Vouchers**

Section 8 Tenant Based (Voucher) unit counts are based on a periodic local Public Housing report of the number of units reported in HUDCAPS as of specific dates (usually in the later months of the calendar year). Except as noted, multi-county PHA unit distribution is based on PHA actual data reflected in the most current and complete MTCS/PIC reports.

Funding amounts are based on the total Annual Contribution Contract amount for Section 8 vouchers and mod. rehab. units as based on a periodic local Public Housing report. The ACC amount is divided by the number of vouchers and mod.rehab. units under ACC to yield a per unit figure. This per unit amount is then multiplied by the program units under ACC to yield a program funding amount. ACC amounts are based on PHA fiscal year end. Amounts for December 31 PHAs are based on prior year reports (i.e. Jackson, Klamath, Lincoln, Linn-Benton and Umatilla are prior year amounts).

- o 2001 and 2002 unit distribution based on 2000 actual unit distribution. PIC data not currently available, or out of date.
- o 2002 adjustment to 2001. Unit count correction made to Central Oregon (Crook, Deschutes and Jefferson counties), Northwest Oregon (Clatsop, Columbia, and Tillamook counties) and Portland (Multnomah county) Housing Authorities. See attached "Unit Counts".

**15. SECTION 8 PROJECT BASED, MODERATE REHABILITATION**

Mod. Rehab. unit counts are based on a periodic local Public Housing report of the number of units under ACC. Funding amounts are based on the total Annual Contribution Contract amount for Section 8 vouchers and mod. rehab. units as based on a periodic local Public housing report. The ACC amount is divided by the number of vouchers and mod.rehab. units under ACC to yield a per unit amount. This per unit figure is then multiplied by the Mod.Rehab units under ACC to yield a program funding amount. See item 14 for further per unit detail.

- o 2002 adjustment to 2001. NW Oregon and Portland per unit HAP increased to reflect change in total Voucher and Mod. Rehab units. See note above regarding unit counts.

**16. SECTION 8 TENANT BASED, ADDED**

Totals all incremental additions of voucher units announced during a calendar year. Programs included: Fair Share, Mainstream, Family Unification Program, Welfare to Work. Distribution of funding and units based on ratio described in item 14.

**17. SELF-SUFFICIENCY AND RESIDENT SERVICES**

With the 2002 report several community development program funding streams have been summarized as a single line item. These include:

**a. DRUG ELIMINATION GRANT**

Distribution of Public Housing funds is based on the ratio established for the LRPH program (note 13).

- 2002. Retroactively separated Multifamily and Public Housing drug elimination funding. Were originally combined since most MFH grantees were public housing agencies or affiliates.
- 2002 adjustment to 2001. Public Housing grants doubled counted, corrected from \$2,966,226 to \$1,484,772.

**b. FAMILY SELF-SUFFICIENCY**

This category totals FSS funding for both Section 8 tenant-based and Low-Rent Public Housing programs. For Sec. 8 tenant based funding, the county distribution is based on the ratio established for the Section 8 tenant-based program (note 14). For LRPH, the county distribution is based on the ratio established for the LRPH program (note 13).

**c. SERVICE COORDINATOR**

This totals funding for Public Housing Elder Service Coordinator program. Distribution of funding for multi-PHA service area is based on the public housing ratio described in item 13.

- 2002. Retroactively separated Multifamily and Public Housing service coordinator funding. Were originally combined since most MFH funding is minimal.

**d. RESIDENT OPPORTUNITY AND SELF-SUFFICIENCY**

This category totals EDSS, Resident Service Delivery Model (ROSS), Tenant Opportunity Program (TOPS), and the apprenticeship program. For multi-site grantees (i.e. Polk-Salem, Portland-Clackamas), the distribution of funds is based on a ratio of LRPH units in a PHA jurisdiction to the total LRPH units in the multi-PHA jurisdiction.

**e. TECHNICAL ASSISTANCE - PUBLIC HOUSING**

Site specific.

**18. HOPE VI**

Site specific.

**19. SECTION 8 PROJECT BASED**

Based on a report by Seattle Multifamily Housing for Federal Fiscal Year End, which provides actual units under Contract and expenditure of rent subsidy.

- 2002. There is a substantial decrease in Section 8 project based funding from 2001 to 2002. Since there was little loss of units, this would appear to be a decrease in the expenditure per unit. A decrease in expenditure is contrary to the perception that the Oregon economy would drive payments up as tenant income decreases.

We believe the decrease is due to the method of calculation. A use rate calculated by HQ was used in 2002. The use rate is believed to be more reliable than the burn rate used to calculate the 2001 Hub estimate.

**20. SECTION 202 ELDERLY HOUSING**

The number of incremental units awarded during the calendar year. Funding amount is the total of the capital advance and the budget authority for rent subsidy (PRAC Project Rental Assistance Amount).

**21. SECTION 811 HOUSING FOR PERSONS WITH DISABILITIES**

The number of incremental units awarded during the calendar year. Funding amount is the total of the capital advance and the budget authority for rent subsidy (PRAC Project Rental Assistance Amount).

## **22. MFH RESIDENT SERVICES**

With the 2002 report several community development program funding streams have been summarized as a single line item. These include:

### **a. CRIME PREVENTION - NEW APPROACHES**

Site specific.

### **b. DRUG ELIMINATION GRANT**

Most Oregon MFH funding is awarded to PH owners/agents of MFH properties. In prior years, all DEG funding was attributed to Public Housing. In 2002, the distribution was adjusted retroactively. Distribution of MFH funds is site specific.

### **c. SERVICE COORDINATOR**

The dollar amount awarded to non-PHA multifamily owner/agents is minimal and in prior years were attributed in total to Public Housing. Multifamily Housing awards are site specific.

- 2002. Retroactively separated Multifamily and Public Housing service coordinator funding. Were originally combined since most MFH funding is minimal.

### **d. TENANT TRAINING**

The amount awarded for training and information directed to tenants affected by subsidy contract expirations or restructuring of HUD insured and subsidized loans. Amount is distributed in Oregon statewide on a per capita basis. No funding was calculated for Washington State counties (Clark, Klickitat or Skamania).

## **23. FAIR HOUSING INITIATIVE PROGRAM**

FHIP funds are distributed based on a per capita basis for the service area designated in the application. In most cases the service area is Oregon state-wide.

## **24. HOUSING COUNSELING**

Reflects local agency funding; it does not include national Consumer Credit awards. Distribution based on per capita of service area for grantee.